

29 December 2022



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Nifty index ended 0.38% higher, ended at 18,191. The broader markets represented by the Nifty 500 Index ended 0.34% higher, ending at 15,485. Among the sectorial indices, Nifty Metal was the top gainer gaining by 1.08%, followed by Nifty Bank gaining by 0.99%. Nifty Media was the only loser losing by 0.64%.

Eicher Motors was the top gainer, gaining by 2.17%, followed by Bharti Airtel and SBI which gaining by 2.11% & 1.79%. Apollo Hospital was the top loser, losing by 1.40%, followed by Tata Motors and Titan which losing by 1.38% & 1.04%.

Nifty Crucial Supports & Resistances-

Supports- 18150, 18050 Resistances- 18150, 18200

Open Positional Calls-

T+30 INST POSITIONAL SELL-

| Fut Segment | BANK OF BARODA @ 185-190, TGT- 150, Closing SL- above 210

T+30 INST POSITIONAL SELL-

| Fut Segment | BHARTI AIRTEL @ 830-840, TGT- 760, Closing SL- above 880

T+7 POSITIONAL SELL-

| Fut Segment | KOTAK BANK @ 1810-1820, TGT- 1755, Closing SL- above 1845

Nifty Intraday Chart



Market in Retrospect

The Indian benchmarks mirrored the global peers for most part of the day and traded flat to low, however, the headline indices recouped the losses and made a comeback at the end of the day.

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Market Turnover (In Crore) 29-12-2022

Name	Last	Previous
NSE Cash	49506.14	43260.77
NSE F&O	35672918.71	15917700.94
BSE Cash	2,735.65	2,993.88
BSE F&O	*NA	113.06

FII Derivatives Flow (In Crore) 28-12-2022*

Instrument	Purchase	Sale	Net
Index Future	4010.38	3625.45	384.93
Index Option	1148247.65	1149155.70	908.05
Stock Future	31009.00	31267.59	258.59
Stock Option	8003.79	7924.17	79.62

Institutional Flow (In Crore) 29-12-2022

Institution	Purchase	Sale	Net
FII	4288.43	4861.21	572.78
DII	9634.45	9118.62	515.83

*Data not updated till 7:10PM

NIFTY Top Gainers

Name	%1D	%5D	Day Vol	Avg 5 Day Vol
Eicher Motors	2.17	2.34	881072	493251
Bharti Airtel	2.11	0.51	6110313	3428866
SBI	1.79	3.10	20130392	10523210
Tata Steel	1.59	3.81	51751642	49417100
Indusind Bank	1.40	4.32	3134405	2229054

NIFTY Top Losers

Name	%1D	%5D	Day Vol	Avg 5 Day Vol
Divi'S Laboratories	0.99	2.39	535637	686465
Ultratech Cement	1.02	0.43	449116	302388
Titan	1.04	2.83	1583143	1235914
Tata Motors	1.38	2.17	15627403	14921440
Apollo Hospitals	1.40	5.38	530411	432602

Bulk and Block Deals

<https://www.nseindia.com/products/content/equities/equities/bulk.htm>
<http://www.bseindia.com/markets/equity/EQReports/BulknBlockDeals.aspx>

Sensex Intraday Chart



Market in Detailed (Updated after 4:00 PM)

Indian Indices

Name	Index	Net Chng	%1D	%5D	%1M	%3M	%1Y
Sensex	61133.88	223.60	0.37	0.51	2.47	8.37	5.76
Nifty	18191.00	68.50	0.38	0.35	2.29	8.16	5.68
BSE M Cap	25220.62	22.71	0.09	0.26	1.79	2.89	2.17
BSE S Cap	28707.42	61.93	0.22	1.01	2.16	2.35	1.23
Nifty MC 100	31350.90	25.35	0.08	0.05	1.03	3.86	4.03
BSE Auto	28975.54	64.80	0.22	0.43	2.95	0.92	18.07
BSE Capgoods	33437.00	140.93	0.42	0.35	0.59	8.97	16.81
BSE FMCG	16170.29	19.73	0.12	0.93	1.31	0.11	18.90
BSE Metal	20777.56	234.32	1.14	3.42	4.57	18.40	8.96
BSE Oil&Gas	20382.70	272.50	1.36	1.44	0.28	9.81	16.09
BSE Healthcare	23117.22	37.74	0.16	1.82	3.08	0.29	10.61
BSE Power	4401.55	31.73	0.73	1.13	4.12	5.52	25.93
BSE Realty	3420.15	6.37	0.19	0.95	3.18	3.24	10.72
BSE ConsDur	39388.82	201.23	0.51	0.65	4.43	5.48	9.88
BSE Bank	49175.41	450.72	0.93	1.87	0.12	14.23	23.39
BSE IT	28719.60	94.91	0.33	0.07	5.65	5.34	23.31

Bond Markets

Name	Yield	Net Chng	%1D	%5D	%1M	%3M	%1Y
US	3.88	0.01	0.20	5.34	3.50	2.36	150.06
UK	3.71	0.05	1.26	3.23	19.55	10.55	265.84
Brazil	6.16	0.01	0.23	1.68	0.77	10.62	35.66
Japan	0.46	0.00	0.22	15.25	82.21	80.78	631.75
Australia	4.03	0.01	0.22	6.06	11.68	2.29	162.90
India	7.31	0.00	0.03	0.10	0.45	0.34	13.17
Switzerland	1.58	0.01	0.51	5.26	49.39	20.12	1238.13
Germany	2.51	0.01	0.28	6.27	30.54	15.04	1463.59

Currency

Name	Rate	Net Chng	%1D	%5D	%1M	%3M	%1Y
INR	82.81	0.05	0.06	0.06	1.31	1.16	9.75
USD Index	104.24	0.23	0.22	0.07	2.42	7.14	8.66
YUAN	6.96	0.02	0.27	0.32	2.82	2.33	8.55
GBP	1.20	0.00	0.04	0.12	0.59	8.15	10.87
EUR	1.06	0.00	0.23	0.38	2.96	8.36	6.28
YEN	133.71	0.76	0.57	1.02	3.68	8.04	14.03

Freight

Name	Index	Net Chng	%1D	%5D	%1M	%3M	%1Y
Baltic Dry	1515.00	135.00	8.18	2.88	14.43	16.44	31.66
Baltic Dirty	1873.00	14.00	0.74	4.00	23.02	26.21	138.30
SG Dubai HY	25.48	2.40	10.40	18.79	23.39	24.23	638.55

Global Indices

Name	Index	Net Chng	%1D	%5D	%1M	%3M	%1Y
Dow Jones	32875.71	365.85	1.10	0.08	2.89	12.49	9.90
Nasdaq	10213.29	139.94	1.35	3.17	7.01	4.88	35.22
S&P 500	3783.22	46.03	1.20	1.00	4.41	3.92	21.07
FTSE100	7486.78	8.10	0.11	1.61	0.30	8.83	0.92
CAC40	6514.86	6.03	0.09	0.97	2.29	14.79	9.01
DAX	13945.49	25.60	0.18	1.04	2.82	16.50	11.99
Mexico IPC	49648.21	791.81	1.57	1.54	1.05	10.08	5.88
Brazil Bovespa	110236.7	1658.51	1.53	2.61	0.61	2.39	5.89
Russian RTS	949.12	11.46	1.23	2.52	16.26	11.85	40.54
Japan Nikkei	26093.67	246.83	0.94	1.56	6.90	1.24	9.73
Hang Seng	19741.14	157.77	0.79	3.38	8.44	15.00	14.49
Taiwan Index	14085.02	88.08	0.62	2.48	4.25	4.07	22.81
Shanghai Comp	3073.70	13.70	0.44	0.63	2.41	1.07	14.55
KOSPI	2236.40	44.05	1.93	5.11	8.10	3.02	25.29
Malaysia KLCI	1491.63	11.52	0.78	1.99	0.99	6.74	3.46
Jakarta Comp	6860.08	9.56	0.14	0.52	2.17	2.50	3.93
Philippine SE	6566.39	0.15	0.00	0.70	3.16	10.65	10.47
Thai Exch	1661.20	13.92	0.85	2.75	2.27	4.32	0.48

Indian Indices

Name	Index	Net Chng	%1D	%5D	%1M	%3M	%1Y
NYMEX Crude	78.02	1.15	1.46	0.61	0.50	4.21	1.63
BRENT Crude	82.33	1.06	1.27	0.00	2.43	2.04	11.55
Natural Gas	4.75	0.04	0.83	9.81	33.31	32.60	15.90

LME

Name	Index	Net Chng	%1D	%5D	%1M	%3M	%1Y
Gold(\$/Ounce)	1806.46	2.32	0.13	0.43	3.25	8.80	0.11
Silver(\$/Ounce)	23.88	0.35	1.48	0.33	12.36	26.91	4.61
Aluminium	2350.26	13.15	0.56	1.15	0.97	11.77	17.26
Copper	8426.00	98.00	1.18	1.48	6.18	12.05	12.18
Zinc	3025.00	38.00	1.27	0.88	2.63	5.45	14.93
Lead	2264.75	57.75	2.49	4.22	7.67	23.72	1.91

Agro Commodities

Name	Price	Net Chng	%1D	%5D	%1M	%3M	%1Y
Coffee	170.95	2.60	1.50	0.94	1.21	21.17	24.16
Cotton	83.10	0.16	0.19	5.89	3.09	0.45	6.04
Sugar	20.28	0.12	0.60	2.27	3.84	14.12	9.86
Wheat	776.50	9.00	1.15	1.14	0.64	14.48	1.96
Soybean	1512.50	1.75	0.12	1.89	3.17	6.16	20.06

Nokhra solar project's 50MW capacity to begin commercial operation from Dec 30

NTPC on 50 MW solar power capacity of Nokhra project in Bikaner will begin commercial operation from December 30. Earlier this month, a 100 MW unit of the project started commercial operation. With this, standalone installed and commercial capacity of NTPC will become 58,259 MW, while the group's capacity will be 70,874 MW.

Indian pharma Marion Biotech halts plant in Noida after Uzbekistan deaths

Indian Pharma company Marion Biotech Pvt Ltd has halted the production of cough syrup following allegations by Uzbekistan that at least 18 children died in the country after consuming the medicine. A joint inspection of the manufacturer's Noida facility was carried out by the teams of the Uttar Pradesh Drug Control Department and CDSCO. The Central Drugs Standard Control Organisation (CDSCO) is in contact with the national drug regulator of Uzbekistan regarding the matter. The samples of the cough syrup have been taken from the manufacturing premises and sent to Regional Drugs Testing Laboratory (RDTL), Chandigarh for testing. Meanwhile, Marion Biotech Pharma company has said that it has sent samples of the said cough syrup for testing and has also halted the production of the product. Hasan, the Legal Head of Marion Biotech, expressed grief over the deaths on behalf of the company and said that an inquiry in the matter was being conducted by the government.

Timely resolution of FDA action crucial to Indian pharma's US pipeline

The Indian pharmaceutical industry's recent tryst with the US drug regulator may impact future pipelines, observe analysts. Data shows that there were about 60 official action indicated (OAI) citations by the US Food and Drug Administration (USFDA) at Indian sites between November 2019 and November 2022. For the most part, in the past 12 months, five OAI classifications have been issued, of which two have been escalated to 'import alert'. This is significant because the fate of these facilities now hangs in balance until a final classification is announced by the FDA. Glenmark Pharmaceuticals' Baddi site was inspected in June this year and issued an import alert in October. Even the Halol site was inspected in May this year. Subsequently, it was issued OAI classification in August. Recently, it was issued an import alert within six months of USFDA inspection. After the USFDA inspectors visit a plant, they either clear the plant or issue what is called Form 483 with their observations. Companies typically respond to queries raised by the regulator within a stipulated time frame. Eventually, the FDA issues the final classification of the site – which could be OAI, warning letter voluntary action indicated (VAI) or no action indicated. An import alert may follow a warning letter or OAI classification if the FDA is not satisfied with the remedial action taken by the company.

Godrej Properties buys 9-acre land in Gurugram, sees revenue of Rs 2,500 cr

Godrej Properties has acquired around 9 acres of land in Haryana's Gurugram, predicting a revenue potential of some Rs 2,500 crore in the residential project. The project in Golf Course Road Extension will offer 1.6 million square feet of premium residential development. The company has been eyeing the National Capital Region (NCR) market, especially Haryana. Earlier this week, it bought about 62 acres of land in Kurukshetra for about Rs 100 crore to develop a plotted residential project with a revenue potential worth Rs 550 crore.

CORPORATE ACTION BONUS / RIGHTS / STOCK SPLIT / DIVIDEND / FCCB / M&A / WARRANTS ETC.

Company	Details
Sarthak Metals Ltd	Cash dividend of INR1 effective 30-12-2022
Dhanlaxmi Bank Ltd	Corporate meeting effective 30-12-2022
SKIL Infrastructure Ltd	Corporate meeting effective 30-12-2022
Corporate Merchant Bankers Ltd	Corporate meeting effective 30-12-2022
Trinity League India Ltd	Corporate meeting effective 30-12-2022
Genomic Valley Biotech Ltd	Corporate meeting effective 30-12-2022
TT Ltd	Corporate meeting effective 30-12-2022
Globe Commercials Ltd	Corporate meeting effective 30-12-2022
Sanmit Infra Ltd	Corporate meeting effective 30-12-2022
Leena Consultancy Ltd	Corporate meeting effective 30-12-2022
Zydus Lifesciences Ltd	Corporate meeting effective 30-12-2022
Trivikrama Industries Ltd	Corporate meeting effective 30-12-2022
Dharani Sugars & Chemicals	Corporate meeting effective 30-12-2022
Equipp Social Impact Technologies Ltd	Corporate meeting effective 30-12-2022

Domestic Events

- India Foreign Exchange Reserve for December 23, 2022.
- India Current Account Balance for Q2 FY22-23.
- India Infrastructure OutPut for November 2022.

Global Events

- China Current Account Balance for Q3 2022.

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